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STICKY

Onboarding new team members + understanding competencies

8 months ago · 4 replies

Bec Cooper

Hello everyone,

My name is Bec and I'm a Product Manager looking into Contractor Management at SafetyCulture. Part of our research has uncovered a big need for tracking qualifications of workers (both contractors and internal employees) which is something we are currently working on.

I'm researching how we can onboard workers into an organisation including collecting relevant qualifications from workers. I'd love to start a discussion to help me answer a few questions:

1. What type of information do you need to collect from new workers when they start working with your organisation?

2. Does this differ for contractors vs internal employees?

3. How do you track the type of information you need to collect? (Excel, ISO standards, a very knowledgeable team members brain etc)

4. In the SafetyCulture platform, if we were to introduce the ability to create an onboarding checklist where would you envision this would be found?

I would love to hear more to see how we can solve this problem in the SafetyCulture platform to continue to help businesses understand the qualifications of their workers.

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4 replies

BE

BenGur   8 months ago

Hi Bec,

I've spoken to a number of people at SafetyCulture about this issue - earlier today I spoke to @Austin Turner about it!

Answers to your questions are below, however, I think there's a much bigger opportunity to improve productivity across the (construction) industry, as all this information needs to be shared with contractors and government organisations.

Each builder, government agency, and project has its own competency management system. That means that as well as collecting this information from employees/contractors when they commence employment, we also need to share it in a variety of web-based portals each time we start a project, or pick up a new client.

Anyway… Here are the answers to your questions, but if you're interested in talking about this further, I'm happy to share my experiences:

1. Government issued ID, Trade licences, High Risk Work Licences, Working at Heights, Working in Confined Spaces, Drivers Licence, "Safely Access the Rail Corridor" certificates, Pre-work medicals. (also, tracking expiry dates etc...)

2. For contractors, in addition to these we also need public liability insurance COC, Workers Compensation Insurance COC, etc.

3. The requirements are established and documented in our Management Systems and also in our clients documented requirements.

4. We use job management software called Simpro, which has a competency management section on each employee's profile.

Thanks for looking into this issue!

2 people like this

👍   ❞

POPEY   8 months ago

Hi @Bec Cooper

This would be great, as the onboarding process is often a space where there is a gap between what the office knows and has regarding information collected on a new starter, and what information front line Supervisors have access to.

There is a wide array of information which needs to be gathered, some of which only needs to be seen by administration, and other information which needs to filter down to onsite employees.

We need to collect informaiton such as tax, super, bank details and medicals, which is managed by administration. However other information such as, Tickets, Qualifications, Preecription medications etc, needs to find its way to the supervisor.

I see the contractor management in SC looking alot like the assets. Each persone has a profile, where documentation can be stored under the profile, however access to the information is limited depending on your permissions. This would be great in the field, A supervisor could open the user profile in the field and se all relevant competencies, tickets and training without having to look into a register or shared drive. As with assets, if each user had a unquique code which was used when signing onto a temaplate, these completed template could be linked to their profile, this would be great for things like TBT or other training packages.

At the moment we use papaer based system for gathering a large amount of our onboarding information. Documents, dependig on sensitivity are either ina resytricted drive, or shared drive. Training is kept on an excel spread sheet, which is an absolute monster document and very time consuming.

I would expect to see an onbording checklist in a persons profile, just like assets. You could group personal profiles to sites and also under different sub-contractors if you had the need.

Cheers

3 people like this

👍   "

Bec Cooper   AUTHOR   8 months ago

Thanks @BenGur and @POPEY this is so helpful and I really appreciate your replies.

For context, we're in the process of building out a solution that will help to collect external licences and credentials from workers and store them against a user in the SafetyCulture platform. @BenGur I believe this will be similar to what Simpro can offer at the moment and our very first slice of this will be available in the coming months.

Following this we're looking at how we can request the correct credentials from workers based on criteria you'd set up for your workers. I'd love to chat a bit more about how you would envision this working on the SafetyCulture platform if you'd be interested in jumping on a call?

We are also looking at how we can build a solution for workers to store their licences and credentials outside of an organisation and easily share these with all of the organisations they work with. This seems especially useful for contractors who work with many different organisations and need to repeat this task constantly.

A few other things we're exploring at the moment:

1. Competencies matrix (to replace the monster Excel file most companies seem to have)

2. Contractor companies where you can store documents relevant to the business you are engaging with such as SWMS, insurance policies, contracts etc as well as manage all of the users who belong to these organisations

3. Onboarding checklists for workers (As mentioned above)

I'd love to get some feedback from you both on those designs and ideas. I'll reach out to you both separately to try and organise a time.

2 people like this

👍   "

Corey   8 months ago

We use one of the big-name HR management solutions for new employee and temporary worker onboarding. It meets our needs, and we would definitely not want to duplicate effort into SafetyCulture. Outside of standard new employee documentation, we do not have a reason to gather licenses and other credentials related to their qualifications.

Where I see potential is with contractors. There are visitor logging systems that include such features, so I don't know if it makes sense to duplicate those entire platforms, as they are quite extensive in capabilities. While we really would like to have that capability companywide rather than at select sites that have implemented one, it's yet "one more system" for people to get used to. A few sites have setup inspections in SafetyCulture to use for visitors, primarily to capture annual agreements and training. Capturing contractor insurance, licensing, and other credentials is usually done separately, as the crew foreman would have all those details for the business and each contractor working on the job.

I actually have a fear that SC is pursuing a lot of new capabilities outside of its core wheelhouse and will become an "everything" system like SAP where it is overcomplicated or overlaps with other purpose-built systems already used.

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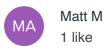Get started

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